

# Customer offboarding template

Subtitle here

## Project summary

Project details	Description
Customer name	[Insert customer name]
Project start date	[Start date]
Project end date	[End date]
Project description	[Brief description based on creative brief or project proposal]

## Activities checklist

Activity	Description
Contract review	Review original contract terms.
Team consultations	Consult with relevant departments (e.g., creative, services teams) for insights.
Review communication records	Review meeting minutes, recorded calls, and related documents for project history.

## Communication plan

Timeline	Action
Four weeks prior	Provide updates on all deliverables and timelines; schedule final meeting if not yet scheduled.
Two weeks prior	Send reminders about how and when deliverables will be handed off; confirm point of contact for any issues.

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One week prior	Express enthusiasm for the final meeting and confirm if there are any outstanding questions from the client's side.
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### Final handoff meeting

Agenda	Notes
Review deliverables	Ensure all planned deliverables are ready and align with the client's vision for the project.
Capture testimonials	Request client feedback and ask for testimonials, if permitted. Alternatively, schedule a follow-up if they need leadership approval.
Photos/documentation	Reserve time for capturing any project-related photos or documentation with the client.

### Final check (housekeeping)

Task	Description
Access confirmation	Confirm where and how they can access final deliverables.
Login information transfer	Send login credentials or transfer administrative access as required.
File return	Return any files or documents necessary for the client.

### Appreciation and follow-up

Action	Description
Thank you note	Send a personalized thank-you note or token of appreciation.
Testimonial follow-up	Follow up on testimonials or referrals as discussed during the final meeting.
Future opportunities	Inform the client about opportunities for reactivating services or accessing company resources if they decide to return.

## Final billing and account settlement

Billing item	Details
Outstanding invoices	List any unpaid invoices and request payment by [due date].
Refunds or credits	If applicable, detail any credits or refunds and confirm they will be processed within [number of days] business days.

## Internal notes for offboarding

Task	Assigned to	Notes
CRM update	[Team member]	Update the client's status and ensure all details are archived.
Data deletion compliance	[Team member]	Ensure data deletion follows GDPR and other regulations.
Notification to departments	[Team member]	Notify billing, IT, support, and any other relevant departments of the service termination.